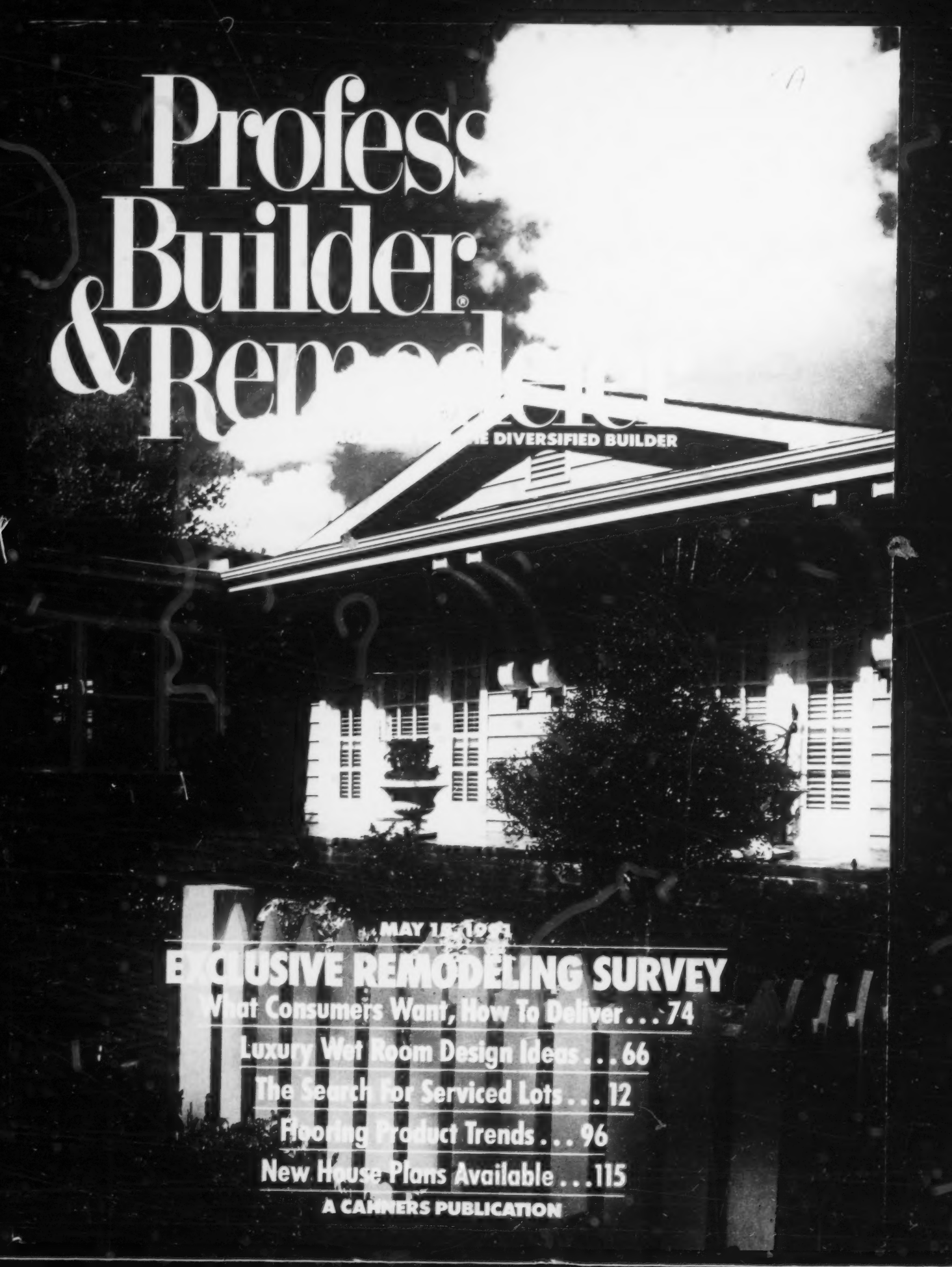
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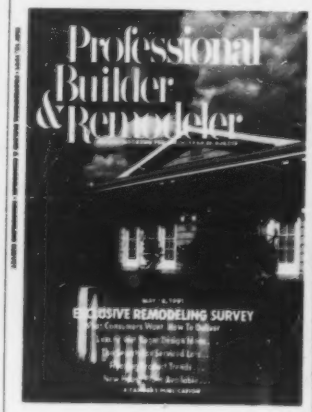
Professional Builder & Remodeler

THE ONE MAGAZINE FOR THE DIVERSIFIED BUILDER



On The Cover

■ When Tulsa's Ken Klein, Kleinco Construction Services, completely remodeled this 1920s era farmhouse, he discovered that he wasn't the first. As near as he could tell, the 4200-square-foot building had been renovated at least five times in previous years. Klein completed the work for $60 a square foot. Photography by Marc Berlow.

Luxury wet-room stylings: p. 66.

Special roof techniques: p. 93.

FEATURES

Luxury Wet Rooms 66

The best builders and remodelers are able to work magic in these rooms, turning traditional elements into fresh designs—garden spaces, party kitchens and great rooms—that reflect the distinctive lifestyles of discretionary buyers.

1991 Remodeling Survey: What Consumers Want 74

Quick turnaround times, quality workmanship and moderate costs—they are the top demands of consumers who undertake a remodeling project. But is the industry delivering?

Consumer remodeling survey: p. 74.

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Business

■ With A&D funds in short supply, many builders are being forced out of the land development business and looking to large developers for finished lots: *p. 12.*

Markets

■ Most builders of golf-related communities concentrate on affluent buyers. But some now see potential in getting prices under $200,000 to tap the mother lode of baby boomers taking up the game: *p. 21.* Integrated software helped Harding Hill Homes, Princeton Junction, N.J., grow from $1 million in annual sales to $15 million in four years: *p. 24.* How an extensive renovation became a remodeler's own show home: *p. 28.*

Marketing

■ Don Glendenning is generating business by offering to buy his clients' homes. Details on how the program works: *p. 45.*

Technology

■ A St. Louis builder stays competitive by combining style with savings. A special roof technique, for example, gives his homes extra energy value: *p. 93.*

Next Month

■ In the June 1, 1991 issue: Our very popular "Best of the West" feature on top-selling homes from California, Arizona, Colorado and Texas.

BUSINESS

■ AD&C

Land Development: Best Left To The Master Planners?

With A&D funds in short supply, many builders are looking to large developers for finished lots.

The credit crunch, along with regulatory and growth constraints, is forcing some builders out of the land development business.

As development is a lengthy, costly process, smaller builders tend to feel the risks outweigh the rewards. They now often opt for the safety of buying improved lots from others. (The chart at right indicates changes in lot prices from 1980 to 1990 in selected markets.)

"A lot of builders can't get the financing to do acquisition and development," says Don Alexander, president of Marlex Housing, Boca Raton, Fla. "Some of the larger companies, like Arvida, will develop lots and sell them to builders. But it's not a real great picture here for a builder trying to go out and get an A&D loan."

Marlex participated in a joint venture with Ahmanson Developments, Diamond Bar, Calif., in which the builder found the land and the developer purchased and developed it. However, Ahmanson is not entering into any new ventures at this time, Alexander reports.

Kim Boutelier, president of Ahmanson, thinks the future will be "a wave of institutional developers that will buy the big pieces of property, make the monetary commitment to get those pieces entitled, take them to finished lots and sell them off to merchant builders. It's going to put a real squeeze on the middle-tier builder/developer."

Because Ahmanson is owned by Home Savings of America, "we're marching in place until the S&L situation gets sorted out," says Boutelier.

Ben Martz, CEO and chairman of the board of Regency Homes, Coral Springs, Fla., says that the few lenders who still make AD&C loans want tremendous equity down, sometimes as much as 50%.

"We build in subdivisions and communities that are controlled by large master developers such as Arvida, which is owned by JMB Federated and Coral Ridge Properties, which is a wholly owned subsidiary of the Westinghouse Electric Co.," says Martz. "These developers have been around a long time; they're well financed, and they own tens of thousands of acres.

"The advantage," he adds, "is that they land bank it, they zone it, they plat it, they develop it, they do all the work. And they can weather the storms better than the little guys."

However, Martz pays a higher price for the finished lots than if he bought and developed the raw land himself: "My margins are smaller than if I did my own development, but I don't have the risk or the carrying costs."

Dealing with major developers takes stamina, he says. "Some builders wouldn't stand for a developer telling them what architect to use to design their models, or what color to paint their house.

Residential Lot Prices For Selected Metro Areas

	1980	1985	1990	Annual % Change
Northeast/Midwest				
Boston	$23,750	$45,000	$90,000	14.3%
Cincinnati	$15,000	$17,500	$18,000	1.8%
Hartford	$20,000	$25,000	$35,000	5.8%
Indianapolis	$12,000	$16,500	$21,000	5.8%
Kansas City	$14,000	$15,000	$26,500	6.6%
Minneapolis	$20,000	$22,000	$25,000	2.3%
Pittsburgh	$16,900	$20,000	$29,500	5.7%
St. Louis	$15,000	$20,000	$25,000	5.2%
South				
Atlanta	$13,250	$16,000	$18,000	3.1%
Charlotte	$9,500	$14,250	$16,000	5.4%
Chattanooga	$7,500	$8,750	$10,150	3.1%
Dallas	$16,900	$30,000	$32,500	7.3%
Ft. Lauderdale	$21,250	$25,000	$48,000	8.5%
Houston	$12,000	$20,000	$18,000	4.1%
Jacksonville	$12,000	$17,250	$30,000	9.6%
Lexington	$14,000	$25,000	$31,000	8.3%
Louisville	$15,125	$25,000	$23,000	4.3%
Miami	$25,000	$30,000	$37,500	4.1%
New Orleans	$21,000	$35,000	$32,000	4.3%
Oklahoma City	$13,000	$15,000	$15,000	1.4%
Raleigh	$14,500	$25,000	$30,000	7.5%
West				
Albuquerque	$21,250	$28,500	$37,500	5.8%
Boulder	$25,000	$35,000	$43,000	5.6%
Phoenix	$20,000	$30,000	$30,000	4.1%
Portland	$22,000	$22,000	$31,250	3.6%
Salt Lake City	$16,625	$19,750	$25,500	4.4%
San Diego	$40,000	$50,000	$150,000	14.1%
San Jose	$40,000	$70,000	$230,000	19.1%
Seattle	$20,000	$31,000	$77,500	14.5%
Tacoma	$16,500	$21,000	$23,000	3.4%

Note: Each price represents the estimated price of a standard improved, 10,000-square-foot lot.
Source: Urban Land Institute

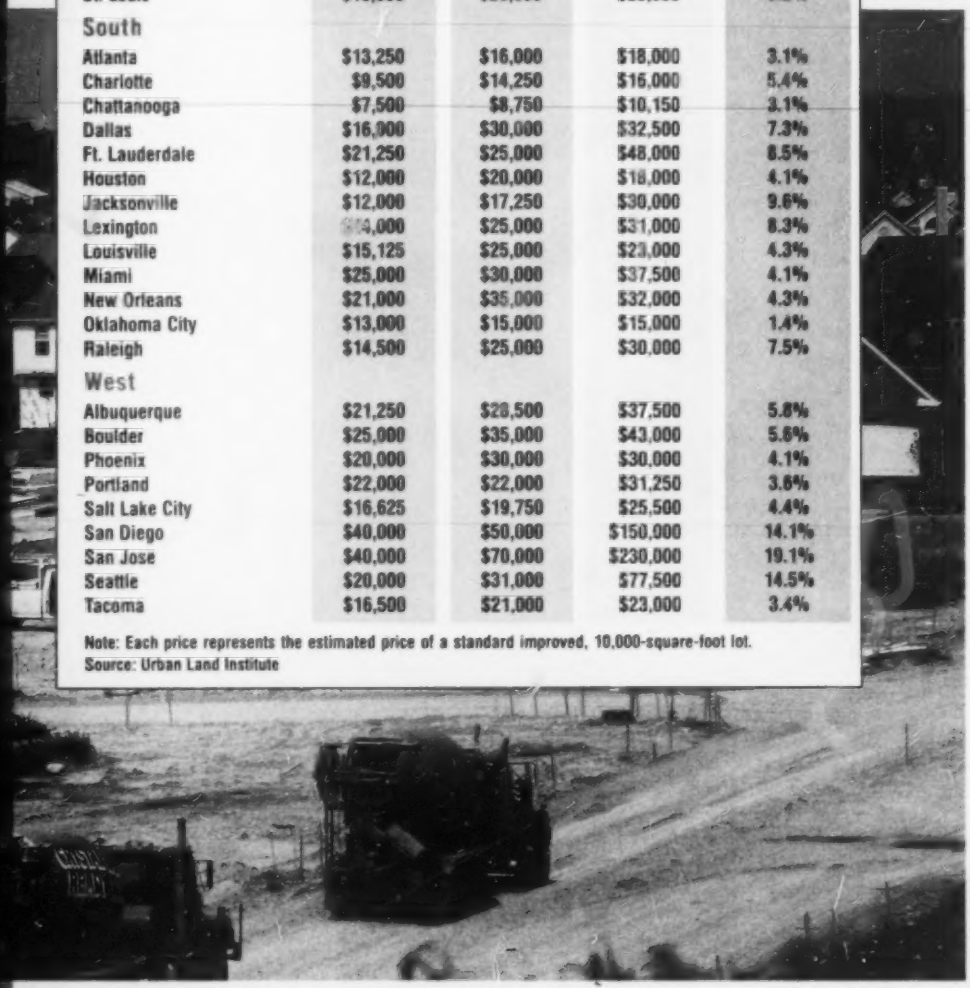


Photo: Mark Berlow

But it's worked out well for us—while other builders were having trouble, last year our sales were up 53%."

Jim Motta, president of the south Florida division of Arvida, headquartered in Ft. Lauderdale, says, "We do programs where we develop the land and sell it to builders on a lot-by-lot basis. Or, we'll sell them a parcel of land, anywhere from 10 to 30 acres, which we will fill. They'll do all the other improvements. We also build our own villages inside communities."

Whereas Martz foresees a shortage of developed lots in Florida, Motta thinks there will be fewer developers.

"It's definitely gotten tougher for a builder to go out and buy his own parcel of land because of the expense of putting in all the infrastructure," he says. "Plus, the approval process takes much longer than it used to. It can be one to three years before the builder can even turn a spade of dirt."

In the Midwest, however, many established builders—large and small—still develop land, both for their own use and sale to other builders. One example is Landmark Homes of Long Grove, Ill., a builder of semicustom homes.

"We find it's an advantage to do both building and developing because we have a certain amount of control over the availability of finished lots, and the design and quality of the community," says principal Peter Bianchini.

Landmark does its own planning in conjunction with local land planners, who supervise the final engineering and installation of the public improvements.

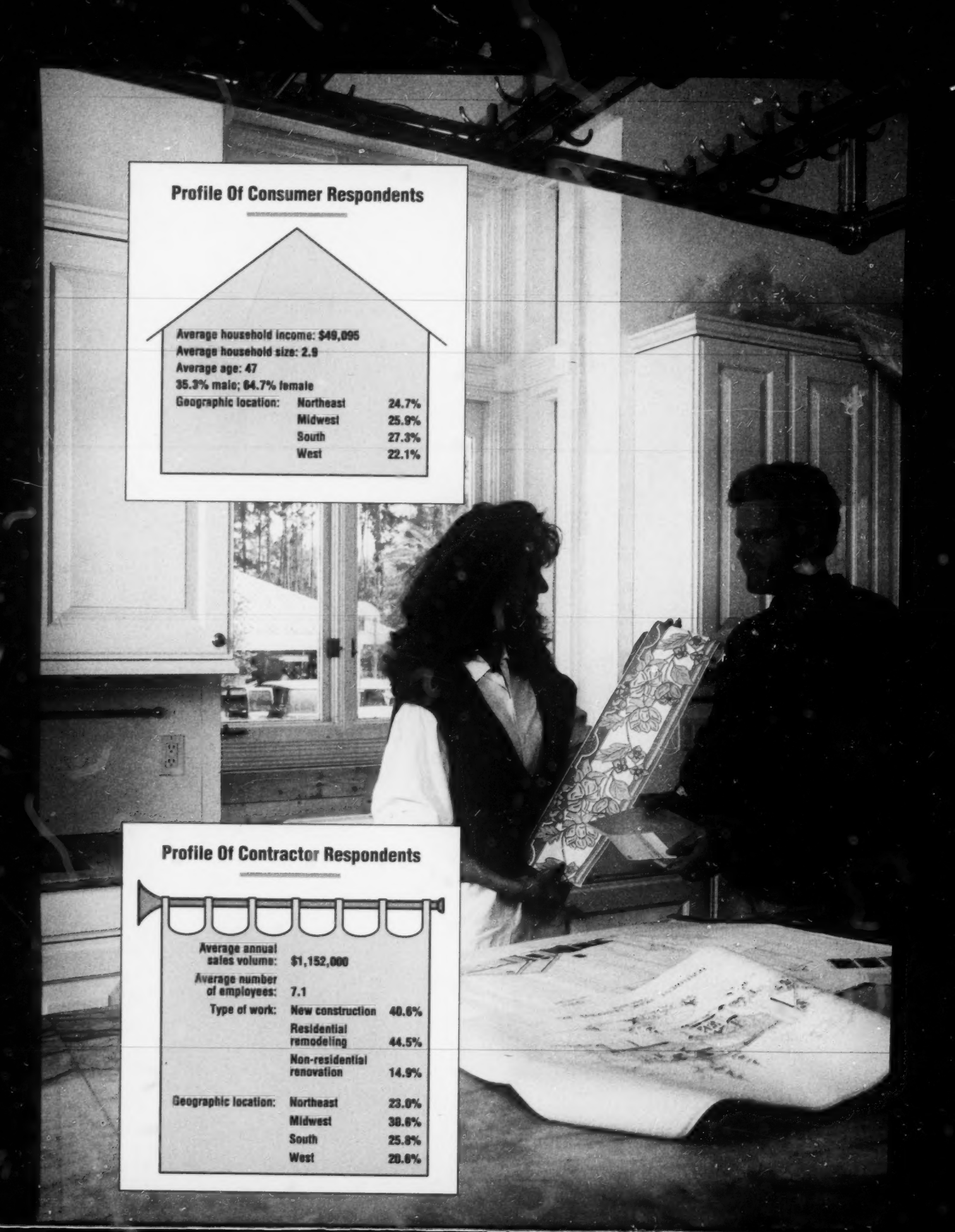
Edwards Land Co. has been a familiar name in Columbus, Ohio, for 30 years. "The local banks feel comfortable with us. We can still get A&D loans, but other developers can't," says President Charlie Driscoll. "The market has definitely contracted, and there will probably be a lot shortage."

Edwards and its homebuilding division, Multicon, is active primarily in suburban Columbus. "We do about 200 lots a year, sell most of them to other builders and keep about one-fourth for ourselves. We try not to carry the land at all. We like to have an option on it until we get the zoning and engineering approvals, then we buy it and start building immediately."

Edwards often forms partnerships with other builder/developers as a safety net for its land ventures.

"Up to now, Columbus has been characterized by a number of small developers, but that will change," says Driscoll.

By Susan Bady,
Senior Editor



Profile Of Consumer Respondents

Average household income: $49,095
Average household size: 2.9
Average age: 47
35.3% male; 64.7% female

Geographic location:	Northeast	24.7%
	Midwest	25.9%
	South	27.3%
	West	22.1%

Profile Of Contractor Respondents

Average annual sales volume:	$1,152,000	
Average number of employees:	7.1	
Type of work:	New construction	40.6%
	Residential remodeling	44.5%
	Non-residential renovation	14.9%
Geographic location:	Northeast	23.0%
	Midwest	30.6%
	South	25.8%
	West	20.6%

PB&R Exclusive
1991 Survey

What Consumers Want In *Remodeling*

By Andrea LaFreniere, Staff Editor, and
Lisa L. Marquis, Staff Editor/New Products

Quick turnaround times, quality workmanship and moderate costs—according to *PB&R*'s Second Annual Survey of Consumers and Remodelers, that's what homeowners want most from a remodeling project.

Last October, National Family Opinion Inc. queried 1462 families who said they intended to have professional remodeling work done on their homes within the next year. At the same time, the Bureau of Building Marketing Research, *PB&R*'s marketing research affiliate, conducted a tandem study among 1500 builders who say they also engage in professional remodeling work.

The following report, based on the results of the two studies, provides an overview of the kinds of additions and alterations homeowners plan, how they select a builder/remodeler and what products they intend to include in their projects.

Complete copies of both surveys are available. Ordering information is included at the end of this report.

Photos: Everett & Soule

What Motivates People To Remodel

Builders would do well to turn remodeling clients into cost-wise consumers. Builders might also market their design and decorating services more effectively.

When it comes to professional remodeling, consumers have emphatic ideas of who they will hire and how they will execute their projects. However, homeowners' expectations of how much their remodeling jobs actually will cost are, by and large, unrealistically low.

What builders say a kitchen remodeling costs is nearly *60% more* than what consumers say it should cost. Builder estimates of a bathroom remodeling job are more than *double* consumer cost expectations. And what builders say a room addition costs is *20% more* than what consumers estimate.

Not surprisingly, consumer cost estimates for kitchen and bath remodeling projects tend to increase as the market value of their home and/or household income increases. Regionally, people on the West Coast expect to pay most to remodel their kitchens. People in the South expect to pay most to add a room.

Across the board, cash emerges as the clear favorite of consumers in terms of financing a remodeling job. Not surprisingly, price tends to be less of a consideration in choosing a remodeling contractor as household income increases. In every region, reliability and high-quality work weigh more heavily than price in the choice of a contractor. Most consumers say they find contractors to do the work via referrals from friends.

As shown in the charts at right, builders would do well to market their design and decorating services more aggressively. Nearly two-thirds of remodeling consumers say their contractors offer no such services, yet most contractors say they do.

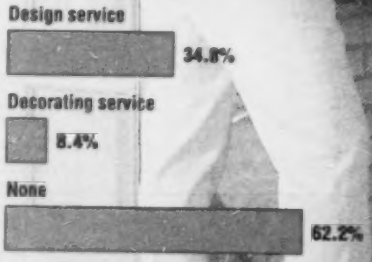
Diversified builders also might give consumers a lesson in calculating turnaround times. Consumer estimates fall well below the five weeks that builder/remodelers say it takes to complete the average remodeling job. □

What Consumers Have Planned

According to our survey, the percent of respondents who plan to remodel a kitchen or a bath tends to increase as the age of the home increases. Of those who plan a room addition, however, more than two-thirds live in a house that is less than 10 years old.

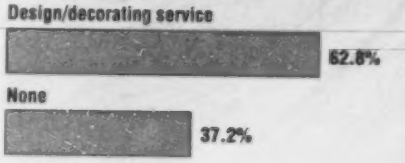
What Consumers Say Contractors Offer

Consumers tend to search elsewhere [illegible] it comes to asking for design and decorating advice about their remodeling project. Nearly two-thirds say their builder/remodelers offer neither service.



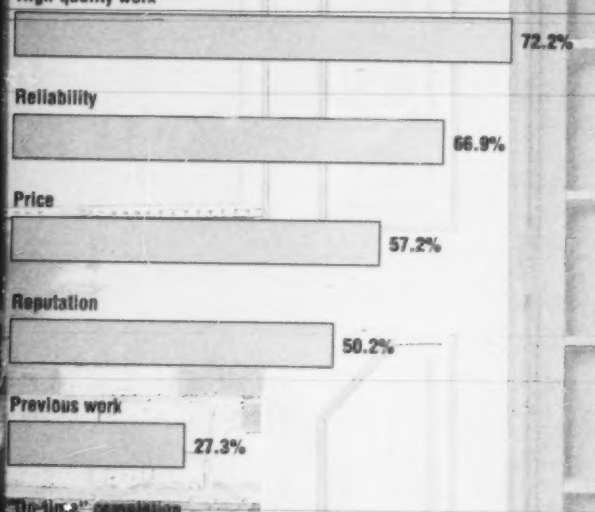
What Contractors Say They Provide

Getting the message out about the availability of design/decorating services might be advantageous to the nearly two-thirds of builder/remodelers who say that they offer *both* options.



How Consumers Evaluate Contractors

High-quality work, reliability, price and reputation factor as the criteria consumers use most in choosing a builder/remodeler. These considerations outrank even previous work done by a builder/remodeler and "on-time" completion dates.



How Consumers Finance Their Projects

When it comes to funding a remodeling project, cold hard cash ranks as consumers' preferred method of financing, with home equity loans and home improvement loans coming in a distant second and third place, respectively.

Cash	60.5%
Home equity loan	17.9%
Home improvement loan	15.3%
Credit union	9.9%
Family/personal loan	6.5%
Second mortgage	3.6%
Refinance original mortgage	2.4%
Construction loan	1.7%
Loan against pension/401(k) plan	0.7%
Other	4.8%

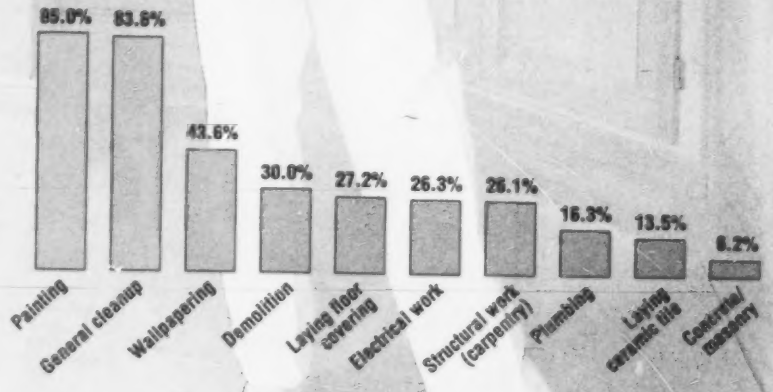
How Long Consumers Say It Will Take

Builder/remodelers might have to educate their clients about turnaround times: more than half the consumer respondents think their remodeling project will take less than four weeks to complete.

Less than 2 weeks	22.2%
2 to 4 weeks	29.4%
5 to 7 weeks	15.9%
8 to 10 weeks	14.3%
11 to 16 weeks	6.8%
17 to 24 weeks	4.3%
More than 24 weeks	7.1%

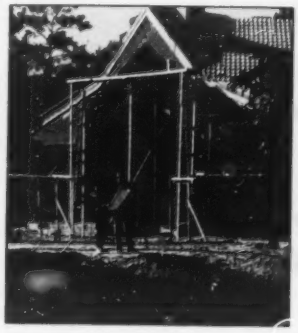
What Consumers Will Do Themselves

More often than not, consumers are willing to do their own painting and cleanup work in order to save on remodeling costs. Less than half will wallpaper, while not quite one-third will do demolition work. Only one-fourth of consumers will lay floor covering or engage in electrical or structural work. Even fewer will do plumbing or concrete/masonry work or lay ceramic tile.



PB&R's 2nd Annual Survey Of Remodeling Activity

Consumers have definite, if somewhat inaccurate, ideas about projected remodeling costs and turnaround times.



What Consumers Expect To Pay By Home Market Value

Consumers' estimated costs for remodeling a kitchen and for remodeling a bath tend to increase as the market value of their home increases. By contrast, their estimated costs for adding a room tend to *decrease* as the value of their home increases.

	Home Market Value				
	Less than $85,000	$85,000-99,000	$100,000-199,000	$200,000-299,000	$300,000-plus
Remodel kitchen	$6000	$6100	$8200	$9300	$15,400
Remodel bathroom	$3100	$3800	$3700	$3600	$5600
Add a room	$20,300	$20,700	$17,100	$18,200	$17,200

Discrepancies In Projected Costs

Builder/remodelers might have to educate consumers about remodeling costs. On average, consumers expect to pay $7800 for a kitchen remodel, $3800 for a bathroom remodel and $19,200 for a room addition. Builder/remodelers expect the same type jobs to cost $12,400, $7700 and $23,600, respectively.

	Consumer	Contractor	Discrepancy
Remodel kitchen	$7800	$12,400	$4600
Remodel bathroom	$3800	$7700	$3900
Add a room	$19,200	$23,600	$4400

How Long Contractors Say It Will Take

Builder/remodelers maintain that a kitchen remodeling will take an average of 4.5 weeks to complete, a bathroom remodeling an average of 3.3 weeks and a room addition an average of 8.2 weeks.

	Kitchen remodeling	Bathroom remodeling	Room addition
Less than 2 weeks	13.2%	35.2%	1.6%
2 to 4 weeks	49.3%	44.4%	16.6%
5 to 7 weeks	24.7%	16.0%	35.1%
8 to 10 weeks	9.8%	4.0%	28.5%
11 to 16 weeks	2.6%	0.2%	12.6%
17 to 24 weeks	0.2%	0.2%	3.3%
More than 24 weeks	0.2%	0%	2.3%

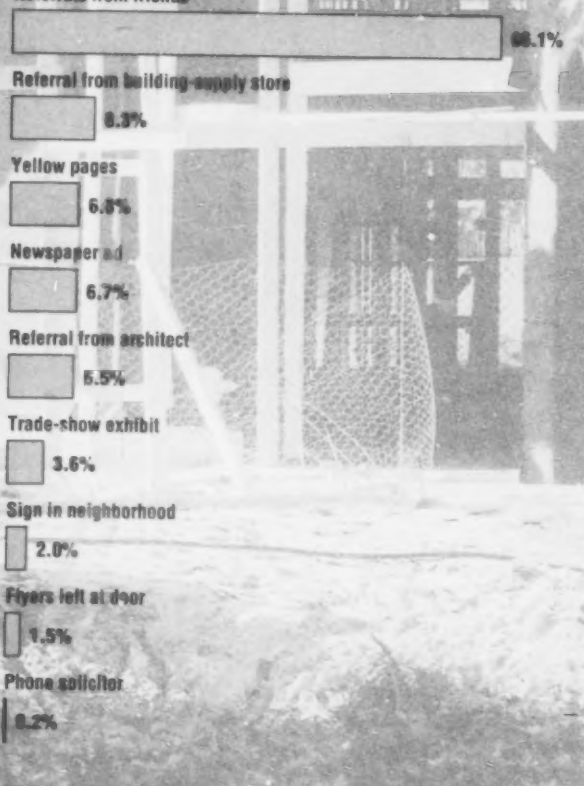
What Consumers Expect To Pay By Region

Consumers in the Pacific region expect to pay $2700 *more* than the national average to renovate a kitchen, while respondents in the Mountain region expect to pay $1600 *less*. Consumers in the East/South Central region estimate that a room addition will cost them $6580, or $12,700 *less* than the national average. The same respondents expect a bathroom remodel to cost them $1800 *less* than the national average.

	New Eng.	Mid-Atl.	East N. Ctrl.	West N. Ctrl.	South Atl.	East S. Ctrl.	West	Mtn.	Pac.
Kitchen remodeling	$6500	$8000	$6200	$7300	$7500	$6400	$5300	$6200	$10,500
Bathroom remodeling	$4500	$4600	$3400	$2900	$4100	$2200	$2800	$2300	$4400
Room addition	$19,500	$18,200	$15,200	$18,900	$22,800	$8500	$22,800	$20,300	$19,100

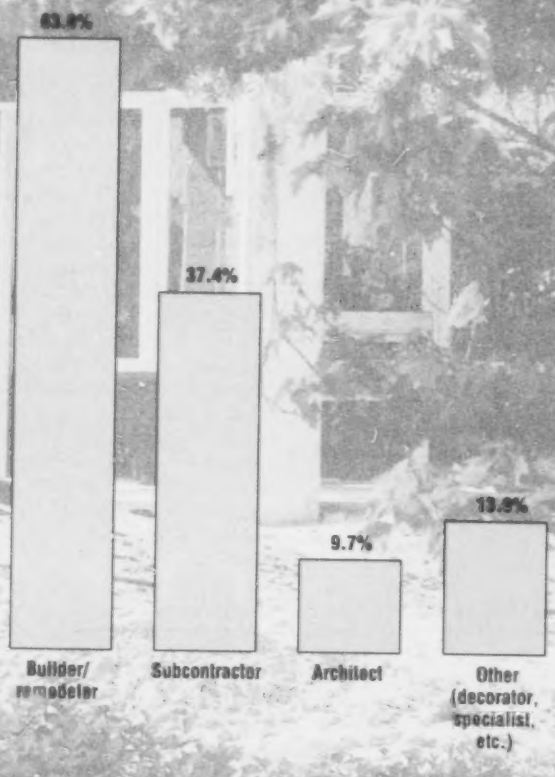
How Consumers Find Contractors

Referrals from friends ranks as the most important way that consumers find builder/remodelers, with more than two-thirds of respondents saying they use this method.



Who Consumers Will Hire

Nearly two-thirds of consumers who plan to remodel within the next 12 months say they will hire a professional builder/remodeler to do the work. Slightly more than a third will go directly to a subcontractor.



How To Reach Today's Consumer

Remodeling comprises a larger portion of a builder's sales volume today than it did five years ago. Smart builders are capitalizing on special marketing techniques to promote this increased activity.

Relative to their other activities, builders think remodeling has become a much more important part of their business within the past five years. Survey respondents (builders who engage in professional remodeling work) said that on average, residential remodeling makes up nearly half their work load.

Room additions, kitchen remodeling jobs and whole-house renovations account for the largest portion of a builder's remodeling volume, followed by bathroom remodeling jobs in a close fourth place.

More than half of the respondents report doing remodeling work on homes they originally built. Nearly one-third say this serves as a consistent source of business for them.

On average, builder/remodelers have an operating radius of 26 miles. Most say that subcontractors handle less than half their remodeling work.

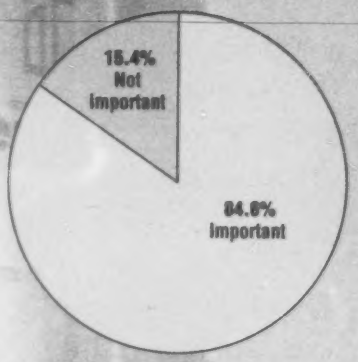
In the way of marketing, builders agree overwhelmingly that referrals from previous clients are the best source of new job leads. On-site signage, while not quite as popular, emerges as the second-best lead generator. Builders in the South find this method particularly helpful.

In addition to getting the word out about any extra services they provide, builders might consider promoting their remodeling business in other ways. Our survey shows that while not even 12% of builder/remodelers have a sales center or showroom, those who do find that, on average, nearly a third of their leads are generated through such marketing ventures.

Builder/remodelers who offer insured warranties on their work do so primarily because it enhances their reputation. Builders also say warranties serve as a marketing advantage, help prevent customer problems and provide legal protection. Some even claim their customers demand warranties. □

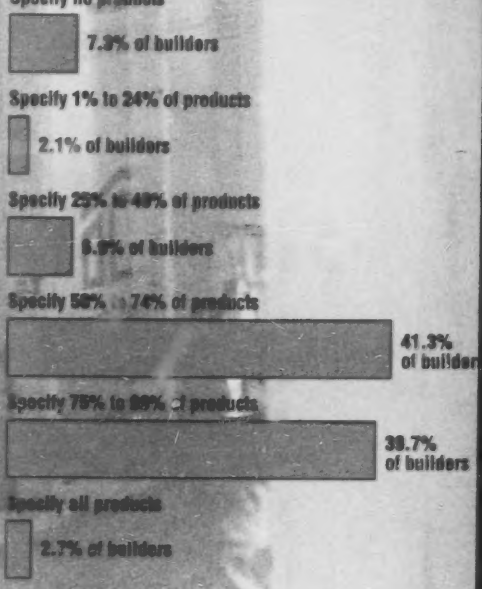
Contractors' Perception Of Brand-Name Products

The majority of builder/remodelers think it's important to use brand-name products in their remodeling jobs. Nearly a quarter of those who live in the East/South Central and Pacific regions, however, do *not* think it important.



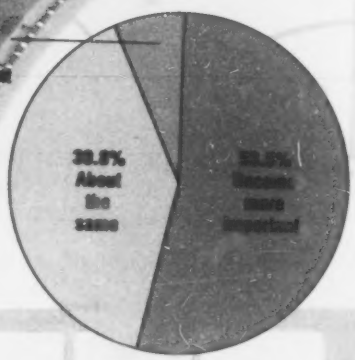
Percentage Of Brand-Name Products Contractors Specify

On average, builder/remodelers specify 60.2% of the brand-name products used in their remodeling jobs.



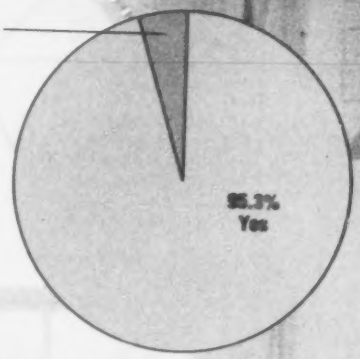
How Remodeling Has Changed In Past 5 Years

Relative to their other construction activities, the majority of builder/remodelers say that remodeling has become more important in the past five years. Of those from the Pacific region, more than 10% think remodeling has become *less* important.



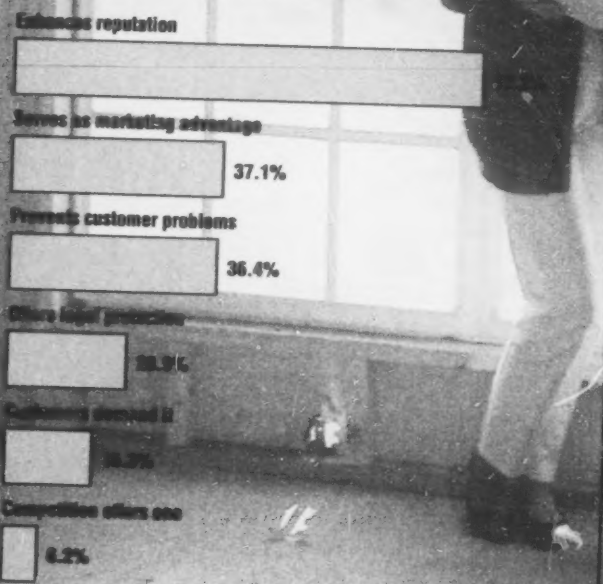
Are You Energy Conscious?

Overwhelmingly, respondents consider themselves "energy-conscious" remodelers. Not surprisingly, however, our survey shows that being "energy conscious" is less important to builder/remodelers in the East/South Central and Pacific regions.



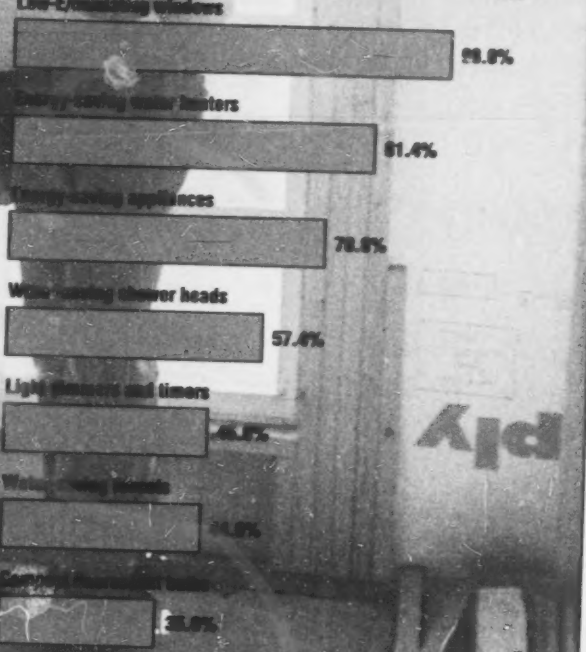
Why Contractors Offer Insured Warranties

Most builder/remodelers say they offer insured warranties because doing so enhances their reputation. Fifty percent of those with an annual sales volume over $5 million say their customers demand a guarantee on their work. More than one-third of remodelers say that warranties serve as a marketing advantage, while about the same number says warranties prevent customer problems.



Favorite Energy-Efficient Products

Insulation, windows and energy-saving water heaters top the list of products "energy-conscious" builder/remodelers say they specify in their jobs. Energy-saving appliances, water-saving shower heads and faucets, light dimmers and timers also are popular.



PB&R's 2nd Annual Survey Of Remodeling Activity

Commercial renovation, landscaping and carpentry services are among the other activities that diversified builders pursue. Some make a substantial profit by remodeling homes they originally built.

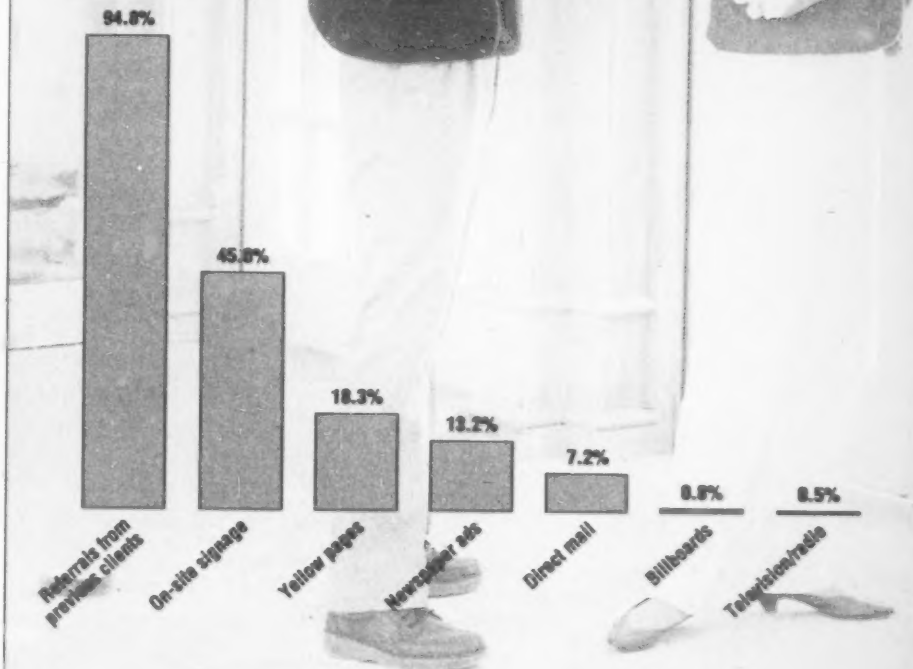
What Percent Of Builder/Remodelers Do Commercial Renovation

More than 75% of those surveyed engage in some type of commercial renovation. Sixty percent say they renovate office buildings, and 43% renovate retail stores. The renovation of restaurants, factories and strip malls also rates high among builder/remodelers.

		Total Annual Sales Volume			
	Total Sample	Under $500,000	$500,000 To $1 mil.	$1 mil. To $5 mil.	Over $5 mil.
Industrial bldgs., factories	20.4%	22.8%	33.8%	37.1%	70.8%
Restaurants	36.8%	29.4%	38.2%	46.1%	69.8%
Retail stores	43.0%	35.1%	50.8%	53.9%	85.8%
Office bldgs.	60.7%	52.8%	73.5%	68.5%	90.8%
Strip malls	23.1%	14.3%	25.8%	48.4%	80.8%
Gas stations	5.6%	3.7%	10.3%	4.6%	8.8%
Other	6.3%	4.2%	4.4%	18.1%	20.8%

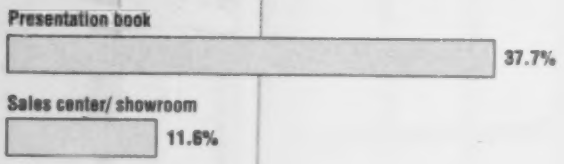
How To Attract Clients

While the majority of builder/remodelers receive referrals from previous clients to attract new business, many use on-site signage. Interestingly, the use of on-site signage seems to be most effective for more than 60% of builder/remodelers from the South Atlantic region.



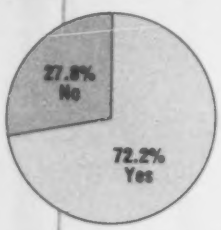
Special Marketing Techniques

More than a third of builder/remodelers say they use presentation books as a marketing technique. Often these are filled with before/after photos of projects they've completed, before/after floor plans, names and phone numbers of previous clients, and letters of recommendation. Slightly more than 10% of builder/remodelers use a sales center or showroom as a marketing tool.



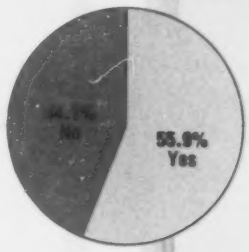
Contractors Who Offer Insured Warranties

Nearly three-fourths of builder/remodelers surveyed say they offer an insured warranty as a guarantee of their remodeling work. Interestingly, nearly half of those from the East/South Central region do *not* offer an insured warranty or any guarantee on their remodeling work.



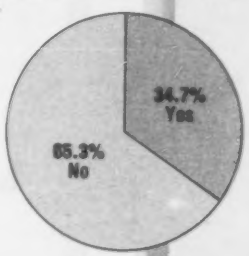
Do Contractors Renovate Homes They Originally Built?

Contractors might do well to solicit remodeling work among those consumers who own homes the contractors originally built. Engaging in such work seems to be a growing trend among the nation's builder/remodelers, with 55% saying they take part in such activity.



As A Consistent Source of Business?

Of those builder/remodelers who renovate homes they originally built, nearly 35% say that type of remodeling work serves as a consistent source of business.



Related Avenues Contractors Pursue

The number of builder/remodelers who offer landscaping services increases as their total annual sales volume increases. Yet the number of those who engage in small "handyman" jobs or who offer carpentry or weatherization services *decreases* as their total annual sales volume increases.

	Total Sample	Total Annual Sales Volume: Under $500,000	$500,000 To $1 mil.	$1 mil. To $5 mil.	Over $5 mil.
Landscaping service	22.1%	20.3%	22.2%	26.7%	36.4%
Carpentry service	87.0%	90.3%	87.3%	81.3%	63.6%
Small "handyman" jobs	72.0%	80.1%	63.5%	58.7%	18.2%
Weatherization service	27.2%	32.2%	19.0%	18.7%	18.2%
Other trade work	45.0%	42.4%	50.8%	48.0%	36.4%

Remodeling Accounts For Much Business

On average, the nearly 500 builders who responded to our survey and who engage in remodeling work said that remodeling work accounts for 52.3% of their total annual sales volume.

Remodeling Activity	Builders
None	6.1%
Up to 1%-24% of business	19.6%
Between 25%-49% of business	16.5%
Between 50%-74% of business	19.6%
More than 75%-99% of business	23.6%
All of business	14%

Hot Buttons In Kitchens & Baths

Consumers plan for upgrades, increased space and assorted products for bath remodeling projects.

Since the "wet rooms" are among the highest-use areas of the home, it is no surprise that consumers have some definite ideas for them when it comes to remodeling.

In the bath, storage seems to be the focal point. Almost three-fourths of remodeling consumers concentrate on upgrading their existing cabinetry, while another 43% plan to increase overall storage capacity. While these homeowners are content to make the most of available space, others are bent on expanding space through more strenuous methods: removing walls (19%), expanding the outside foundation (7%) or opening up the ceiling (5%). Products from a variety of categories are included in bath projects.

When it comes to kitchen modifications, storage is again a top priority: three-fourths of consumers want upgraded cabinetry, while half desire an increase of cabinet space. Another 58% plan to upgrade appliances. Over a third want a new floor plan. Consumers rated their favorite kitchen layout as an "L" shape, followed by "U"-shape, galley and island designs.

Kitchen eating arrangements are also important details. A table eating area in the room is the most popular arrangement with half of the survey respondents. About one-third of consumers prefer a countertop eating area in the room, while 29% choose a separate dining room. A combination kitchen/dining room rates big among almost 20% of respondents.

Lighting and built-in appliances rate high among homeowners as kitchen additions. Other desired amenities for this room include windows, free-standing appliances, doors that offer outside access, skylights or roof windows, and a breakfast nook area.

Be sure to check the products listed on these pages for specifics that consumers want implemented. □

Top Bathroom Additions

Adding windows, wall(s) or a new secondary bathroom rank as the top three additions among consumers who plan to remodel a bathroom. Adding door(s), a utility closet or a skylight also rank as priorities among those consumers who intend to renovate a bath.

Windows	29.1%
Wall(s)	26.7%
New secondary bathroom	25.2%
Door(s)	21.8%
Utility closet	19.9%
Skylight	18.4%
Walk-in closet	14.6%
New powder room	13.1%
Add bathroom to master bedroom	12.6%
Laundry appliances	7.8%

Top Bathroom Modifications

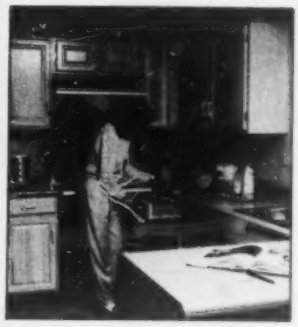
Nearly three-fourths of consumers who plan to remodel their bathroom will upgrade the cabinetry. Almost 43% will increase storage space, and nearly one-fourth will expand the existing bathroom space. Almost 20% intend to remove walls.

Upgrade cabinetry	74.2%
Increase storage space	42.9%
Expand existing bathroom	24.8%
Remove walls	19.3%
Expand outside foundation	7.1%
Increase ceiling height	5.2%
Open to vaulted ceiling	4.9%
Make a garden bath	4.9%

Products Consumers Want Included In Bathroom Remodel

	Home market value in thousands			
	$99 and under	$100 to $199	$200 to $299	$300 plus
Walls				
Wallpaper	49.5%	60.2%	33.3%	38.2%
Ceramic tile	37.6%	39.8%	57.6%	47.1%
Paint	45.5%	40.9%	42.4%	41.2%
Mirrored	6.9%	8.6%	12.1%	23.5%
Marble	4.0%	4.3%	0%	8.8%
Floors				
Ceramic tile	33.7%	49.4%	58.8%	62.5%
Vinyl	47.5%	37.6%	23.5%	15.6%
Carpeted	20.8%	15.3%	11.8%	18.8%
Marble	5.0%	3.5%	14.7%	9.4%
Wood	4.0%	2.4%	5.9%	6.3%
Cabinets				
Medicine	54.0%	51.3%	45.5%	57.1%
Wood	39.0%	50.0%	42.4%	60.7%
Custom-made	30.0%	23.8%	27.3%	21.4%
Linen storage	23.0%	23.8%	15.2%	25.0%
Laminate-faced	11.0%	13.8%	12.1%	14.3%
Faucets/fixtures				
Two-handle faucet	57.6%	45.9%	54.8%	46.7%
Plumbing fixtures	42.4%	44.7%	35.5%	50.0%
Single-handle faucet	32.6%	43.5%	35.5%	53.5%
Tub/shower				
Tub/shower door	38.4%	52.6%	45.0%	32.1%
Water-saving shower heads	60.5%	47.4%	55.0%	32.1%
Separate shower	41.9%	35.5%	40.0%	46.4%
Whirlpool	18.6%	19.7%	20.0%	32.1%
Vanity				
With one bowl	86.9%	82.2%	62.5%	64.0%
With two bowls	14.3%	17.8%	37.5%	36.0%
Countertops				
Laminate	37.9%	42.3%	26.1%	18.5%
Marble	24.1%	22.5%	21.7%	48.1%
Corian	21.8%	26.8%	30.4%	29.6%
Lighting				
Fluorescent	42.0%	37.3%	50.0%	25.0%
Recessed	46.4%	49.2%	50.0%	66.7%
Track	20.3%	22.0%	9.1%	25.0%
Closets				
Closet shelving	76.5%	80.8%	85.7%	76.9%
Walk-in	29.4%	23.1%	21.4%	38.5%
Laundry/utility	14.7%	34.6%	14.3%	38.5%
Toilet/bidet				
Compartmentalized	81.3%	87.5%	90.9%	75.0%
Bidet	18.8%	12.5%	9.1%	37.5%
Windows				
Skylight	69.2%	84.6%	88.9%	58.3%
Bay	38.5%	23.1%	22.2%	50.0%
Miscellaneous				
Exhaust fans	60.0%	70.7%	50.0%	78.3%
Safety features	25.9%	36.2%	22.7%	8.7%
Bathroom heater	28.2%	34.5%	36.4%	47.8%
Ceiling fan	16.5%	31.0%	13.6%	13.0%
Pedestal lavatory	14.1%	5.2%	27.3%	8.7%
Siding	10.6%	5.2%	4.5%	4.3%
Roofing	10.6%	6.9%	9.1%	4.3%
Dressing area	7.1%	3.4%	18.2%	17.4%
Sauna	3.6%	3.4%	0%	8.7%
Intercom	2.4%	3.4%	0%	0%
Fireplace	2.4%	1.7%	0%	4.3%
Garden bath	4.7%	5.2%	9.1%	17.4%
Fitness equipment	1.2%	0%	0%	0%

Designs and modifications are key considerations in kitchen remodeling. Most homeowners also want a special eating layout.



Products Consumers Want Included In Kitchen Remodel

	Home market value in thousands			
	$99 and under	$100 to $199	$200 to $299	$300 plus
Walls				
Paint	61.9%	61.7%	67.6%	73.1%
Wallpaper	56.7%	50.5%	64.7%	26.9%
Ceramic tile	18.6%	25.2%	5.9%	26.9%
Marble	3.1%	0%	0%	0%
Floors				
Vinyl	71.1%	59.3%	48.5%	26.9%
Ceramic tile	18.3%	25.4%	33.3%	37.0%
Carpeted	10.8%	15.3%	3.0%	7.4%
Hardwood	5.4%	9.3%	15.2%	33.3%
Marble	1.1%	1.7%	6.1%	0%
Cabinets				
Wood	41.8%	45.1%	51.4%	51.9%
Custom made	36.7%	28.3%	28.6%	33.3%
National manufacturer	19.4%	23.0%	8.6%	18.5%
Locally fabricated	21.4%	15.9%	20.0%	18.5%
Laminate-faced	19.4%	10.6%	8.6%	3.7%
European-style	2.0%	6.2%	11.4%	14.8%
Countertops				
Laminate plastic	27.1%	32.7%	32.4%	22.2%
Butcher block	21.[illegible]	15.0%	21.6%	11.1%
Solid Corian	20.8%	24.8%	24.3%	25.9%
Other	31.3%	39.8%	27.8%	51.9%
Appliances				
Dishwasher	60.0%	61.1%	61.8%	67.7%
Range/oven	53.7%	54.9%	48.5%	35.5%
Self-cleaning oven	34.7%	47.8%	48.5%	45.2%
Built-in oven	30.5%	31.9%	36.4%	67.7%
Garbage disposal	42.1%	37.2%	30.3%	51.6%
Refrigerator	37.9%	39.8%	36.4%	41.9%
Built-in microwave	34.7%	26.5%	39.4%	58.1%
Built-in refrigerator	5.3%	8.8%	18.2%	16.1%
Trash compactor	8.4%	8.8%	15.2%	25.8%
Appliance garage	9.5%	7.1%	3.0%	6.5%
Hot-water dispenser	4.2%	2.7%	6.1%	25.8%
BBQ grill	4.2%	1.8%	3.0%	12.9%
Restaurant range	3.2%	1.8%	0%	16.1%
Sinks/Faucets				
Double sink	66.7%	65.3%	41.9%	57.7%
Single-handle faucet	44.4%	45.9%	61.3%	73.1%
Stainless steel	62.2%	53.1%	32.3%	38.5%
Enamel/porcelain	20.0%	31.6%	41.9%	26.9%
Water-saving faucet	21.1%	25.8%	22.6%	30.8%
Two-handle faucet	24.4%	10.2%	9.7%	11.5%
Second sink	1.1%	9.2%	16.1%	7.7%
Colored faucet	6.7%	5.1%	9.7%	7.7%
Triple sink	5.6%	2.0%	3.2%	19.2%
Lighting				
Fluorescent	65.0%	52.9%	61.5%	52.2%
Recessed	30.0%	49.4%	50.0%	56.5%
Track	17.5%	7.6%	23.1%	17.4%
Windows				
Exterior	49.0%	45.0%	31.5%	55.6%
Greenhouse	32.7%	35.0%	47.4%	38.9%
Skylight	22.4%	30.0%	26.3%	16.7%
Bay	24.5%	26.7%	21.1%	16.7%
Doors				
Exterior	80.8%	85.7%	50.0%	66.7%
French	26.9%	17.9%	66.7%	44.4%
Island				
With work and eating space	70.3%	62.2%	45.5%	50.0%
With countertop	45.9%	59.5%	81.8%	50.0%
With sink	10.8%	8.1%	27.3%	8.3%
Miscellaneous				
Ceiling fan	50.0%	34.1%	18.5%	37.5%
Pantry	32.1%	25.3%	44.4%	41.7%
Built-in eating counter	20.5%	30.8%	33.3%	29.2%
Lazy susan	23.1%	27.5%	48.7%	12.5%
Closet shelves	15.4%	17.6%	37.5%	25.0%
Insulation	21.8%	16.5%	22.2%	37.5%
HVAC system	16.7%	8.8%	11.1%	20.8%
Roofing	15.4%	15.4%	14.8%	25.0%
Siding	65.4%	54.9%	70.4%	41.7%
Laundry/utility closet	3.8%	5.5%	11.1%	4.2%
Intercom	3.8%	3.3%	3.7%	0%
Built-in table	11.5%	3.3%	0%	4.2%
Thermostats	0%	6.6%	11.1%	16.7%
Locksets	2.6%	3.3%	3.7%	4.2%
Warming drawer	0%	0%	0%	12.5%

Top Kitchen Additions

Lighting ranks as the top amenity consumers will add to their remodeled kitchens. Other favorite additions include new built-in appliances (41%) and windows (30.1%).

Lighting	57.2%
Built-in appliances	41.0%
Windows	30.1%
Free-standing appliances	21.5%
Door(s) to outside	14.7%
Skylight/roof window	14.5%
Breakfast nook	11.5%
Utility closet	11.5%
Laundry area	10.0%
Walk-in pantry	9.1%
Additional range/oven	6.2%
Divider wall(s)	4.4%

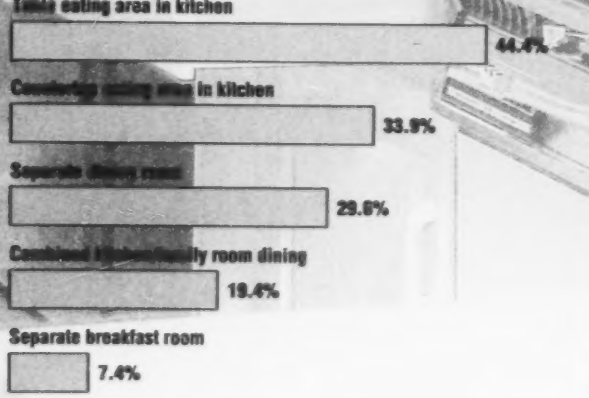
Top Kitchen Modifications

More than three-fourths of consumers who plan to remodel their kitchen say they will upgrade their cabinetry. More than half will upgrade appliances and increase cabinet space. About a third say they will change the floor plan of their kitchen.

Upgrade cabinetry	75.4%
Upgrade appliances	58.5%
Increase cabinet space	51.7%
Change floor plan	36.7%
Remove walls	21.1%
Expand outside foundation	11.1%
Combine with dining room	9.3%
Combine with family room	4.9%
Increase ceiling height	4.9%
Open to vaulted ceiling	2.1%

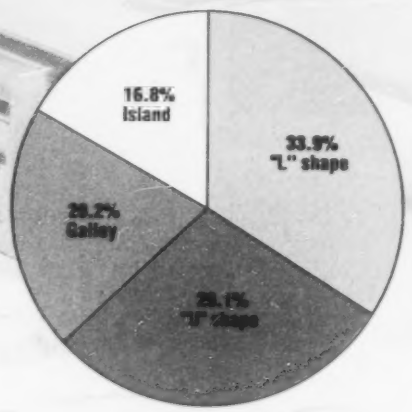
Favorite Eating Arrangement

Consumers are very particular when it comes to outfitting their homes with proper eating arrangements. Nearly three-fourths of those who live in a home that is less than 10 years old want countertop eating area in the kitchen. Nearly two-thirds of those who have owned their homes less than one year want table eating area in the kitchen.



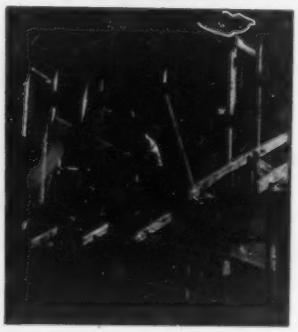
Favorite Kitchen Design

More than one-third of those who live in a home that is less than 10 years old want an island design in their remodeled kitchen. Nearly half of those whose home market value is less than $65,000 want an "L"-shape kitchen. More than 50% of consumers who live in the Mid-Atlantic region also want an "L"-shape kitchen.



How To Sell Room Additions

The average room addition measures about 340 square feet. Raised, flat ceilings, space for a home office and plant shelves are among the top design elements.



According to our survey, homeowners have very specific ideas about what elements they want included in a room addition, as well as the functions it should perform.

One out of four consumer respondents said they were planning an addition of 151 to 300 square feet. Another 22% wanted a bigger addition (301 to 500 square feet in size) while 18.8% wanted something a bit smaller—100 to 150 square feet. On the average, additions measure 340 square feet.

The greatest percentage of consumers (25.7%) say they intend to enlarge or add a bath, while almost as many plan to create an additional bedroom. Other popular reasons for the addition include creating a great room, creating a sun room, enlarging a kitchen, creating a master suite, adding a screened porch and creating a formal dining room.

Design elements to be included in the room addition also play an important role for homeowners. The top-ranking element is an addition that provides space for family entertainment. A greenhouse or sun room is desired by almost one-third of respondents. Raised, flat ceilings, space for a home office, vaulted ceilings and plant shelves/niches are among the most highly requested design elements.

These are followed by the desire for dramatic window treatments, home entertainment centers, private space for live-in relatives, built-in furniture, space for formal entertaining and more.

Consumers plan their additions with specific products in mind. Everything from flooring, windows, styles of roofing and wallcovering are needed. Miscellaneous items like fireplaces, decorative molding and more are included in our listing. To discover the most desired products to integrate, refer to the chart, right, for a breakdown by category. □

Reasons For Adding A Room

Consumers' reasons for adding a room are as diverse as the respondents and the homes they occupy. More than 40% of those who live in a home with less than 1200 square feet of space want to add a bath or more bedrooms. Nearly 30% of those who have a household income of more than $100,000 plan to enlarge their kitchen.

To enlarge or add a bath	25.7%
To add a bedroom	23.9%
To create a great room	18.8%
To create a sun room	17.3%
To enlarge a kitchen	15.5%
To create a master suite	13.8%
To add a screened porch	9.2%
To create a formal dining room	6.7%

Top Design Elements In Room Additions

For those consumers planning a room addition, providing space for family entertainment rates as the favorite design element. Of those who live in a house that is more than 65 years old, nearly 50% plan to include a sun room or greenhouse room in their room addition. More than half of those with a household income of more than $100,000 intend to include space for a full- or part-time office in the design of their room addition.

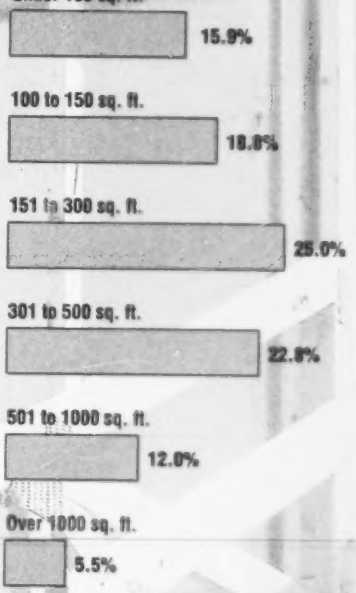
Space for family entertainment	38.8%
Sun room or greenhouse room	32.2%
Raised, flat ceilings	28.8%
Space for home office	25.1%
Vaulted ceilings	18.8%
Plant shelves/niches	17.4%
Dramatic window treatments	17.3%
Home entertainment center	13.3%
Private living space for relatives	12.2%
Built-in furniture	10.8%
Space for formal entertaining	9.3%
Stained molding	8.7%
Interior lofts or balconies	6.1%
Home fitness center	3.9%

Products Consumers Want Included In Room Addition

	Home market value in thousands			
	$99 & under	$100 to $199	$200 to $299	$300 plus
Floors				
Carpet	68.0%	54.5%	55.6%	53.3%
Ceramic tile	24.0%	27.3%	29.6%	33.3%
Wood	12.0%	23.4%	29.6%	33.3%
Vinyl	30.7%	20.8%	33.3%	20.0%
Marble	2.7%	1.3%	3.7%	0%
Windows				
Other windows	56.7%	60.6%	66.7%	52.9%
Skylight	22.4%	25.8%	37.5%	0%
Bay	28.4%	25.8%	25.0%	17.6%
Sun room	17.9%	25.8%	8.3%	11.8%
Greenhouse	11.9%	10.6%	8.3%	5.9%
Decorative window	6.0%	9.1%	16.7%	0%
Walls				
Paint	80.6%	80.9%	92.9%	60.0%
Wallpaper	54.2%	41.2%	42.9%	13.3%
Ceramic tile	23.6%	8.8%	32.1%	26.7%
Marble	2.8%	2.9%	3.6%	0%
Doors				
Exterior	57.7%	55.7%	63.0%	90.9%
Interior	59.2%	50.0%	70.4%	72.7%
Patio	26.8%	28.6%	18.5%	9.1%
Garage	8.5%	14.3%	3.7%	18.2%
Roofing				
Asphalt fiberglass shingles	83.0%	88.0%	72.7%	67.5%
Cedar shingles/shakes	5.7%	10.0%	13.6%	23.1%
Metal tile	9.4%	0.0%	4.5%	15.4%
Clay tile	3.8%	2.0%	13.6%	7.7%
Siding				
Wood	36.1%	45.1%	33.3%	50.0%
Aluminum	14.8%	23.5%	11.1%	8.3%
Brick	19.7%	13.7%	22.2%	16.7%
Vinyl	21.3%	17.6%	38.9%	8.3%
Wood shakes	9.8%	3.9%	0%	16.7%
Hardboard	8.2%	2.0%	5.6%	0%
Lighting				
Recessed	46.2%	54.3%	65.0%	69.2%
Fluorescent ceiling	52.3%	43.5%	60.0%	30.8%
Track	20.0%	28.3%	20.0%	30.8%
Other items				
Insulation	55.7%	56.7%	73.9%	53.3%
Ceiling fan	52.8%	56.7%	52.2%	46.7%
Cabinets	41.4%	32.8%	56.5%	53.3%
Closet shelving	35.7%	26.4%	56.5%	20.0%
New heating system	27.1%	22.4%	21.7%	26.7%
Thermostats	24.3%	18.4%	30.4%	26.7%
Fireplace	15.7%	16.4%	13.0%	6.7%
Air-cond. system	24.3%	11.9%	30.4%	26.7%
Decorative molding	20.0%	11.9%	21.7%	20.0%
Door chimes	7.1%	1.5%	0%	0%

How Much Space Consumers Want To Add

The majority of consumers surveyed (65.3%) will add upwards of 150 square feet to their home with their remodeling project. On average, consumers will add 340 square feet of space.



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